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Tunisia

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Aquaculture Industry Small but Growing

Report Categories:

Fishery Products

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Report Highlights:

Tunisia's aquaculture production rose from a small 140 MT in 1987 to 15,200 MT in 2016, valued at \$75 million, with long-term growth prospects of 10 percent annually as aquaculture increasingly replaces wild catch in Tunisian diets. The leading products in terms of quantity and value are sea bass and sea bream.

Background

Tunisia maintains a Mediterranean coastline of 1,350 km with a national maritime domain of 80,000 km² and 105,200 ha of lagoons. However, while Tunisia has long been a country of sailors and fishing, aquaculture remains a niche industry, accounting for 12% of total fishery production value and 2,000 direct jobs.

The beginning of Tunisia's modern aquaculture industry began in the 1960s with a government-established shellfish farm. The first private hatchery of Sea Bass "*Dicentrarchus labrax*" and Sea Bream "*Sparus aurata*" was later established in the in the 1980s. Fattening of Bluefin Tuna "*Thunnus thynnus*" was launched in 2003, and recent years have been marked by the expansion of floating and submersible cages for Sea Bass and Sea Bream.

Production

Tunisia's aquaculture production rose from a small 140 MT in 1987 to 15,200 MT in 2016, valued at \$75 million. The leading products in terms of quantity and value are sea bass and sea bream.

<i>Tunisia Aquaculture Production, 2007-2016, MT</i>										
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
<i>Shellfish</i>	200	129	158	167	166	115	113	162	171	183
<i>Bluefin Tuna Fattening</i>	519	600	380	373	350	841	380	480	505	520
<i>Other Marine Fish</i> (e.g., Sea Bass; Sea Bream)	1,583	1,901	2,804	4,000	5,837	7,272	10,500	9,994	10,897	13,237
<i>Inland fish</i>	1,114	1,114	1,125	1,176	919	969	997	1,034	1,080	1,260
TOTAL	3,416	4,658	4,467	5,716	7,272	8,736	11,990	11,670	12,653	15,200
		+36%	-4%	+28%	+27%	+20%	+37%	-3%	+8%	+20%

Source: Ministry of Agriculture

While growth has been fast-paced in recent years, Tunisia's Fisheries Association conducted a survey in 2016, which concluded the aquaculture sector's potential future growth may be limited to 10 percent annually.

At present, there are roughly 50 companies involved in aquaculture production:

- Shellfish farming: 12 private companies
- Bluefin tuna fattening: 5 private companies
- Other marine fish farming: 20 private companies
- Inland fish farming: 15 private companies

Most shellfish production is concentrated in northern Tunisia, particularly in the Bizerte governorate's lagoon, using both breeding tables and floating lines.

The primary marine aquaculture production area is in the Monastir governorate, along Tunisia's eastern shore. Marine aquaculture is practiced using modern and innovative techniques, whether in concrete facilities with a density of 60 kg/m³ or in floating cages on the high seas. Alevin are exclusively imported for sea bass and sea bream production while bluefin tuna are imported for fattening.

Inland aquaculture is mostly practiced in the Beja governorate producing freshwater fish, including thinlp mullet (*Liza Ramado*), common carp (*Cyprinus Carpio*), zander (*Stizostedion Lucioperca*), and flathead grey mullet (*Mugil Cephalus*). Inland aquaculture consists of incorporating alevin in dams, some of which are imported and others of which are bred locally.

Tunisia Geographical Distribution of the Aquaculture Production Area



Source: FAS Tunis using Google Maps

Industry points to ineffective disease controls and poor feed quality as causes for below average performance within the aquaculture sector. Industry also indicates the sector is not well organized in terms of value chain integration, relying exclusively on middlemen to get aquaculture products from the farm to the marketplace.

Consumption

Per capita consumption of fishery products coming from both aquaculture and wild catch has slipped from 14 kg in 1988 to 12 kg in recent years. There is also a large disparity between coastal and interior regions, where per capita consumption is only 1.5 kg.

According to industry's 2016 survey, domestic demand for aquaculture products is likely to grow 10% annually and be driven largely by lower availability of wild catch fishery products.

Trade

According to industry's survey, Tunisia exported roughly 4,000 MT of aquaculture products in 2016 and projected to export 8,000 MT in 2017.

The largest export markets are Russia, France, Italy, Algeria, Libya, Canada, and the Gulf.

Policy

Development of the aquaculture sector in Tunisia remains far below its potential, and the government's goal is to support its growth in order to relieve pressure on wild catch fish stocks. The government's plan includes the following:

- Creating a regional feed mill
- Providing technical assistance to private companies
- Training specialized labor
- Supporting private investment in aquaculture projects by subsidizing 7 to 25 percent of the project cost plus tax savings
- Introducing new species, such as shrimp and seaweed
- Promoting exports by negotiating better market access with foreign countries